

EXHIBIT G

AMD

Logic Demand/Capacity 2001 - 2006

MPU Long Range Demand

AMD

- Several cases modeled, per input from CPG
 - Maximum (2001 R6Q (23%); 2002-6: 23→28%)
 - Minimum (No Comm T1; 2001 - 2006: 19%)
 - Best guess (No Comm T1 2001 only; 2002-2006: 20% → 23%)
 - Nominal (R6Q 2001; best guess beyond)
- Another case added (maximum +)
 - 30% market share 2002, beyond

Capacity Assumptions

AMD

- Tops down die ships/wafer
- Use of 0.13 μ foundry starting 2002, to 20% limitation
- Fab 30 at full 5000/week
- Fab 25 cases
 - Does not become long term MPU source (e.g., devoted to appliance, or Flash)
 - Is upgraded to produce HiP7/8 technology
- No IBM foundry source assumed

When Will Fab 35 be Needed? **AMD**

Preliminary Assessment

<u>Market</u>	<u>W/O F25</u>	<u>W/F25</u>
30%	2002	2002
Maximum	2003	2004
Best Guess	<u>2004</u>	<u>2006</u>
Minimum	2004	>2006

What About Fab 25?



Logic

- 0.15 μ CS50 shrink
 - ... LI module concern
- 0.15 μ reverse shrink of 0.13 μ Athlon with Alum backend
 - ... provides short term extension
 - ... would still need to determine long term (Appliance?)
logic role
- 0.13 μ /0.10 μ Copper
 - ... significant retool, but less than new fab
 - ... \$300 - 500M for 4-5K wafers/week capacity
 - ... results in long term MPU supply

Flash

- Still possibility
 - ... Flash capacity increasing rapidly
 - ... watch demand

Possible Scenario

AMD

- Assume nominal demand case
- Upgrade Fab 25
- Defer Fab 35; eventually place in Dresden → 2006

Advantages

- + less capital investment near term; good ROI
- + capitalizes on μ P expertise in Austin
- + allows for more maturity of 300mm tools, process
- + less conflict with Fab 30 ramp

Disadvantages

- could defer 300mm too long
- partnership options may diminish
- G/A opportunities may expire 04?

What's Next?

AMD

- Create financial model

① Fab 25 as is, with Fab 35 in 2003

② Fab 25 upgraded, with Fab 35 in 2005

Assuming nominal case

... With sensitivity analysis on market share

- Firm up Saxony G/A
- Re 300mm partner -- assess need and options

How Am I Leaning?

AMD

- Upgrade Fab 25; defer Fab 35

- Due diligence to plan
- Must support HiP8

what can go wrong?
demand up to 10

- Engage with Foundry

- As 0.13 μ supplier
- Preserve opportunity for larger relationship
 - JV 300mm partner

capex

early 4th or 5th time

- Why?

- Demand uncertainty
- Retains option to partner with Moto in 300mm development without complication of other 300mm manufacturing partner
- Still early for 300mm

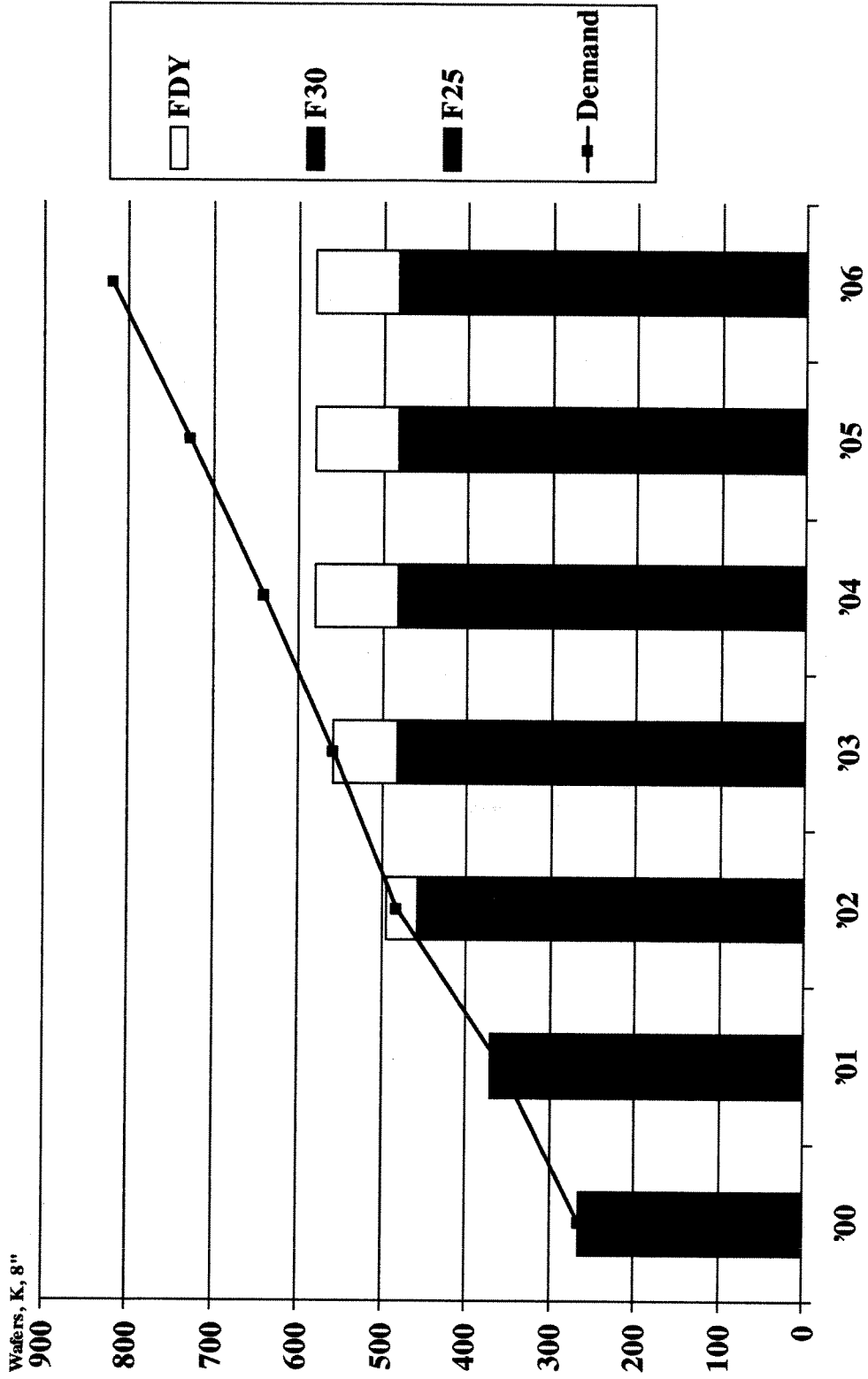
→ Lower risk (financial)

→ Cross Leaning Solution

FAB WAFER CAPACITY VS. DEMAND



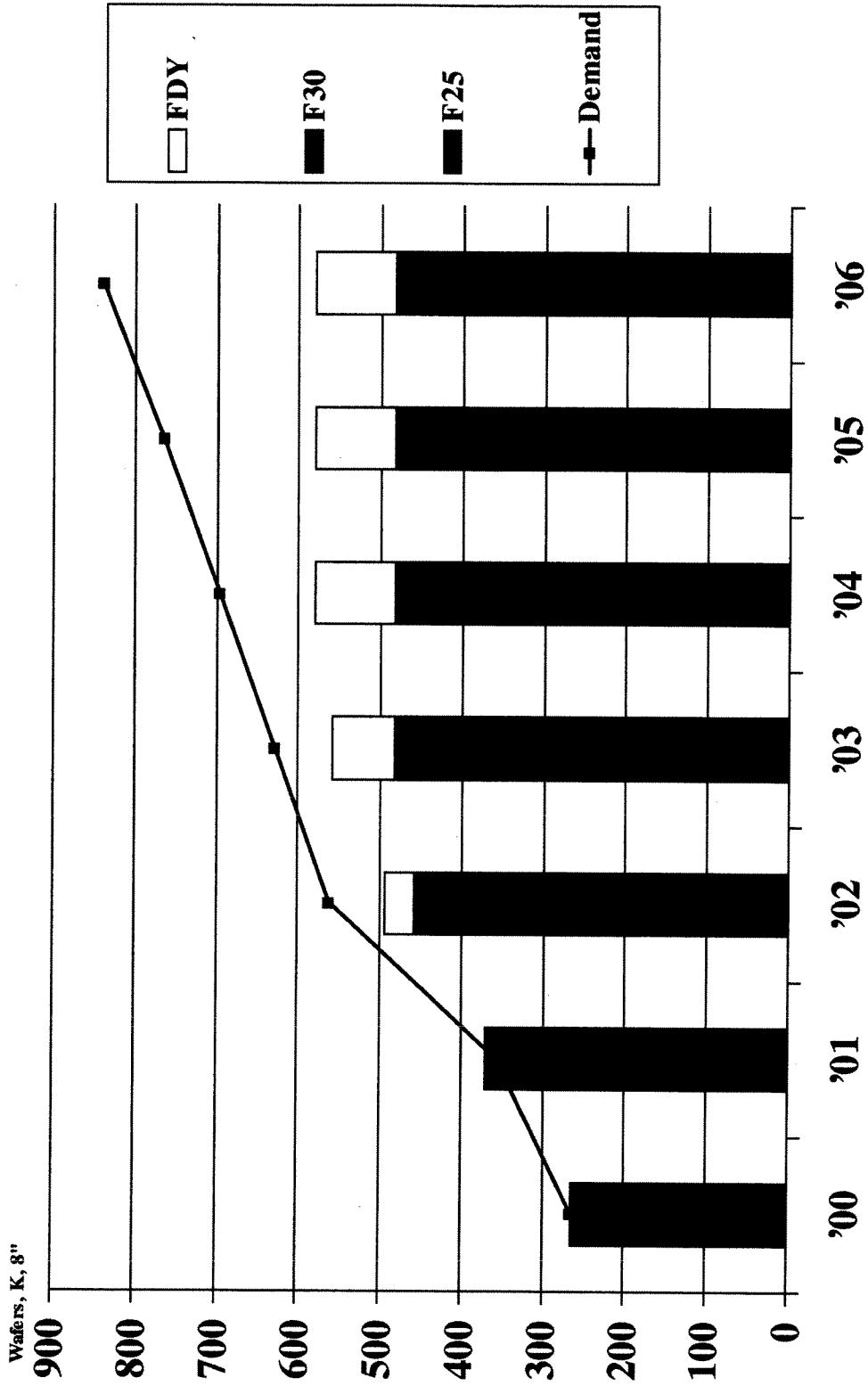
CASE 037 Maximum (F25 Copper, Market Share is 23%, 26%, 27%, 28%, 29% for '01 - '05)



FAB WAFER CAPACITY VS. DEMAND

CASE 037 Maximum+ (F25 Copper, Market Share is 30% for '02 - '06)

AMD



Case 037 Maximum+ 3Q REQ

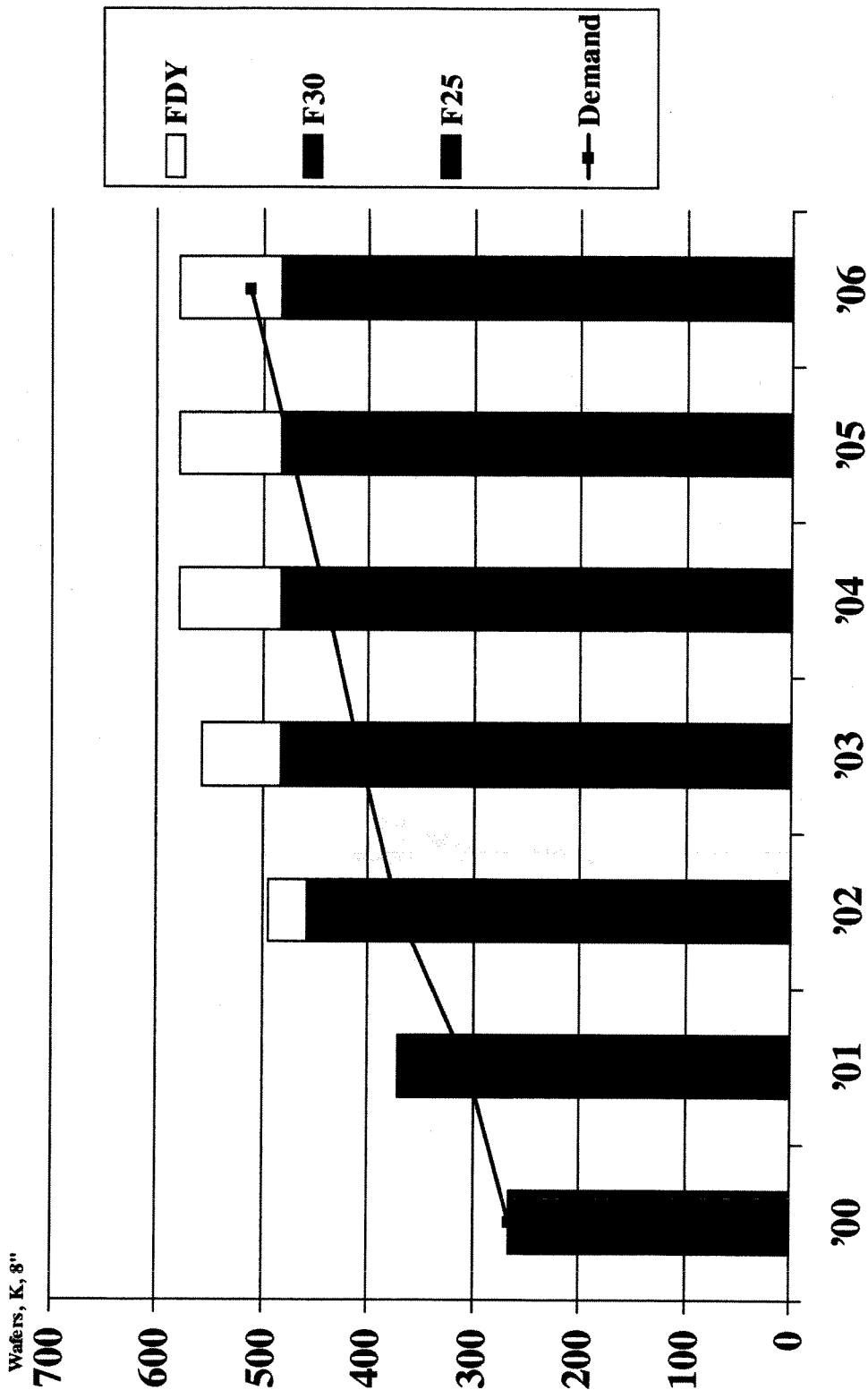
Wafers Out (K)	Act	Act	Est	3Q REQ						YR00	YR01	YR02	YR03	YR04	YR05	YR06
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01								
Capacity	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS44	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Fab 25, CS50	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25																
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1
Die Demand (M)																
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	70.33	78.98	87.90	96.69	106.36	106.36
Growth Yr to Yr										49%	41%	12%	11%	10%	10%	10%
Die Ships Per Water	Based on Die divided by wafers															
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130	130
Water Demand (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5						
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9						
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223						
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9						
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	541.0	607.5	676.2	743.8	818.2	818.2
Water Support (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0	208.0	208.0
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0	228.0	228.0
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6	96.6
Percentage of Total											8%	16%	20%	20%	20%	20%
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	538.1	559.7	559.7	559.7	559.7
Delta Support Processors																
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-66.5	-69.4	-116.4	-184.0	-258.4	-258.4
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	0.0	0.0	0.0	0.0	0.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 30 capacity based on plan 5000_2 dated 8/8/00																
Fab 25 converts to copper																
30% Market Share 2002-2006																

Fab 30 capacity based on plan 5000_2 dated 8/8/00
 Fab 25 converts to copper
 30% Market Share 2002-2006

FAB WAFER CAPACITY VS. DEMAND

CASE 037 Minimum (F25 Copper, Market Share is 19% for '01 - '05)

AMD



Case 037 Minimum 3Q Req

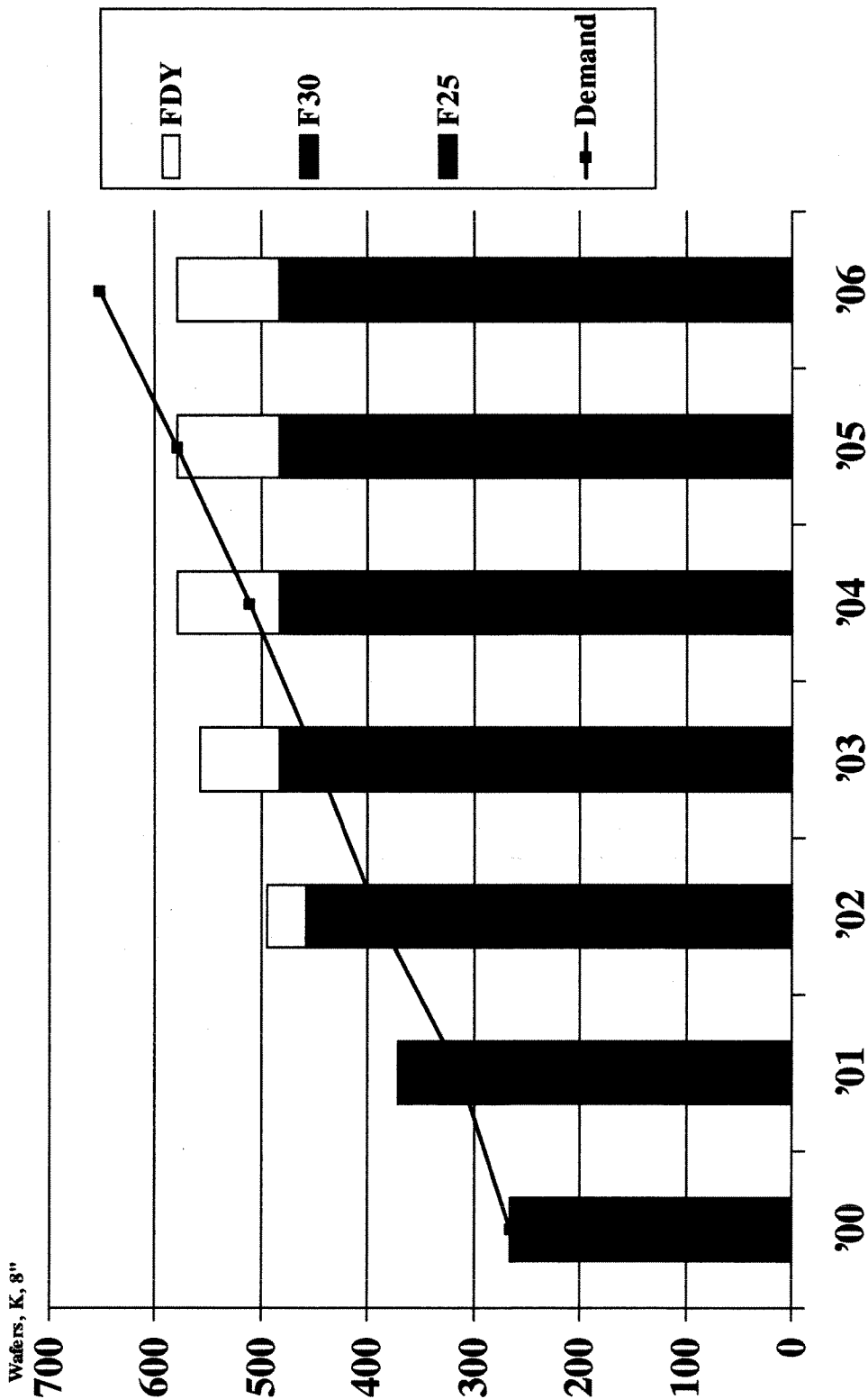
Wafers Out (K)	Act	Est	1Q00	2000	3000	4Q00	YR00	YR01	YR02	YR03	YR04	YR05	YR06
Capacity													
Fab 25, CS44	39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1
Total uP/Emb Capacity	57.8	53.9	73.8	80.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1	483.1
Die Demand (M)													
PC Processors	7.49	6.77	8.69	10.65	33.60	42.34	45.69	50.46	54.70	59.31	64.05	68.8	73.6
Growth Yr to Yr													
Die Ships Per Wafer													
PC Processors	130	126	120	136	128	145	130	130	130	130	130	130	130
Wafer Demand (K)													
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6							
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5							
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9							
Fab 25	57.8	53.9	64.5	63.0	239.2	171.0							
Fab 30 PC Processors	0.0	0.0	9.2	17.4	26.6	134.9							
Total PC Processor Demand	57.8	53.9	72.2	78.5	262.4	293.0	351.5	388.2	420.8	456.2	492.7		
Wafer Support (K)													
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6							
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5							
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9							
Fab 25	57.8	53.9	64.5	63.0	239.2	171.0							
Fab 30 Processor	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Percentage of Total													
Total Processor Support	57.8	53.9	72.2	78.5	262.4	293.0	387.5	463.2	517.4	552.8	599.7		
Delta Support Processors													
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.1	65.0	87.0	74.9	42.3	6.9	0.0	0.0	0.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000_2 dated 8/8/00
 Fab 25 converts to copper
 Market share is 19% for 2001-2005.

FAB WAFER CAPACITY VS. DEMAND

AMD

CASE 037 Best Guess (F25 Copper, Market Share is 20%, 21%, 21%, 22%, 23% for '01 - '05)



Case 037 Best Guess

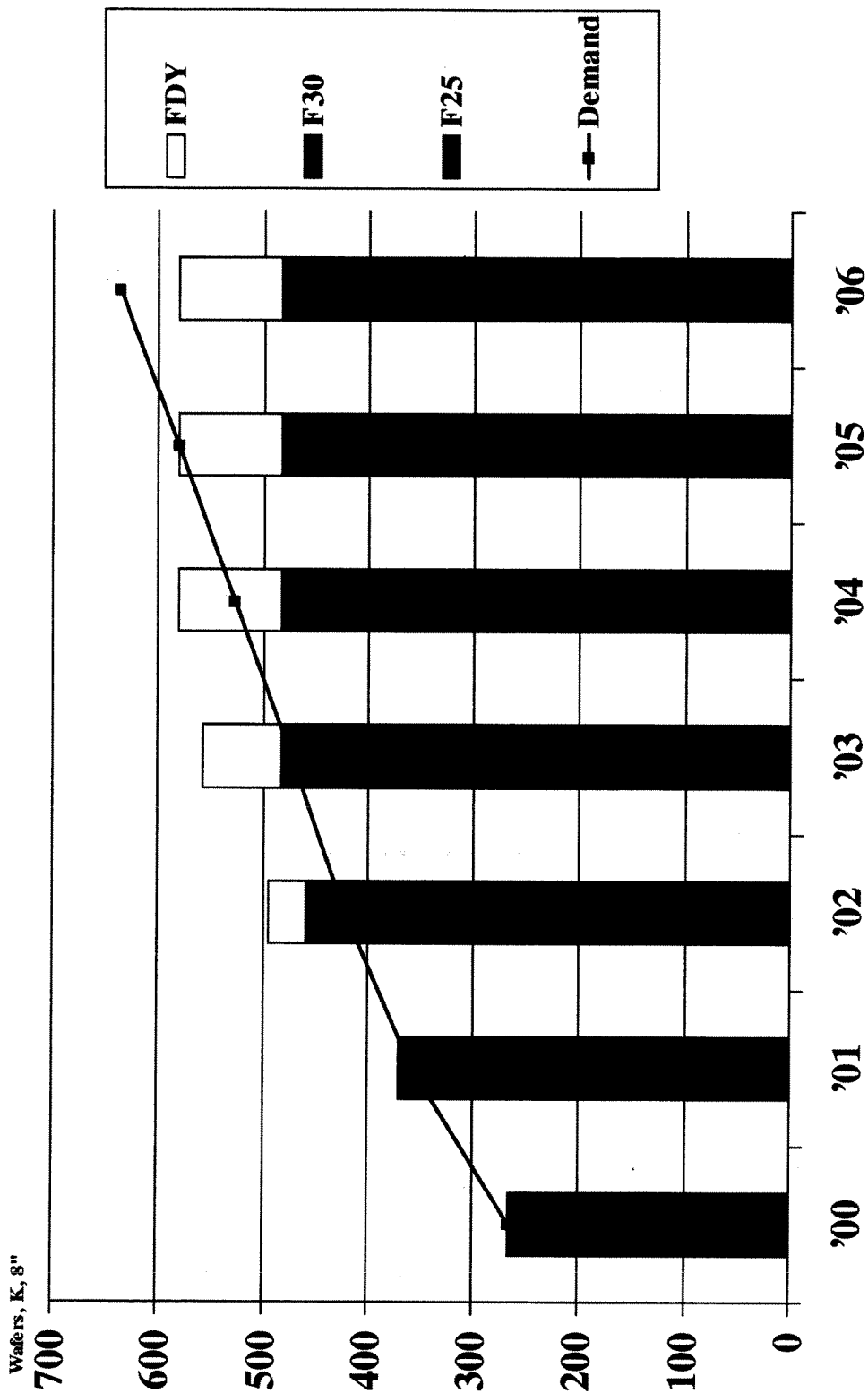
3Q R6Q

Wafers Out (K)	Act	Act	Est	4Q00	YR00	YR01	YR02	YR03	YR04	YR05	YR06
Capacity	1Q00	2Q00	3Q00								
Fab 25, CS44	39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Total uP/Emb Capacity	57.8	53.9	73.8	80.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1
Die Demand (M)											
PC Processors	7.49	6.77	8.69	10.65	33.60	43.34	48.16	55.66	63.84	72.67	82.12
						29%	11%	16%	15%	14%	13%
Growth Year to Year											
Die Ships Per Wafer											
PC Processors	130	126	120	136	128	144	130	130	130	130	130
	Based on Die divided by wafers										
Wafer Demand (K)											
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6					
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	158.5					
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9					
Fab 25	57.8	53.9	64.5	63.0	239.2	178.0					
Fab 30 PC Processors	0.0	0.0	9.2	17.4	26.6	134.9					
Total PC Processor Demand	57.8	53.9	72.2	78.5	262.4	300.0	370.5	428.2	491.1	559.0	631.7
Wafer Support (K)											
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6					
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	158.5					
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9					
Fab 25	57.8	53.9	64.5	63.0	239.2	178.0					
Fab 30 Processor	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6
Percentage of Total							0%	17%	22%	20%	20%
Total Processor Support	57.8	53.9	72.2	78.5	262.4	300.0	425.0	488.6	510.2	559.7	559.7
Delta Support Processors 8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	54.5	60.4	19.1	0.7	-72.0
							24.2	26.9	8.5	0.3	-32.0
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.1	58.0	49.5	49.5	49.5	0.0	0.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000_2 dated 8/8/00
 Fab 25 converts to copper
 Market share is 20%, 21%, 21%, 22%, 23% for 2001-2005.

FAB WAFER CAPACITY VS. DEMAND

CASE 037 Nominal (F25 Copper, Market Share is 23%, 22%, 22%, 23%, 23% for '01 - '05)



Case 037 Nominal

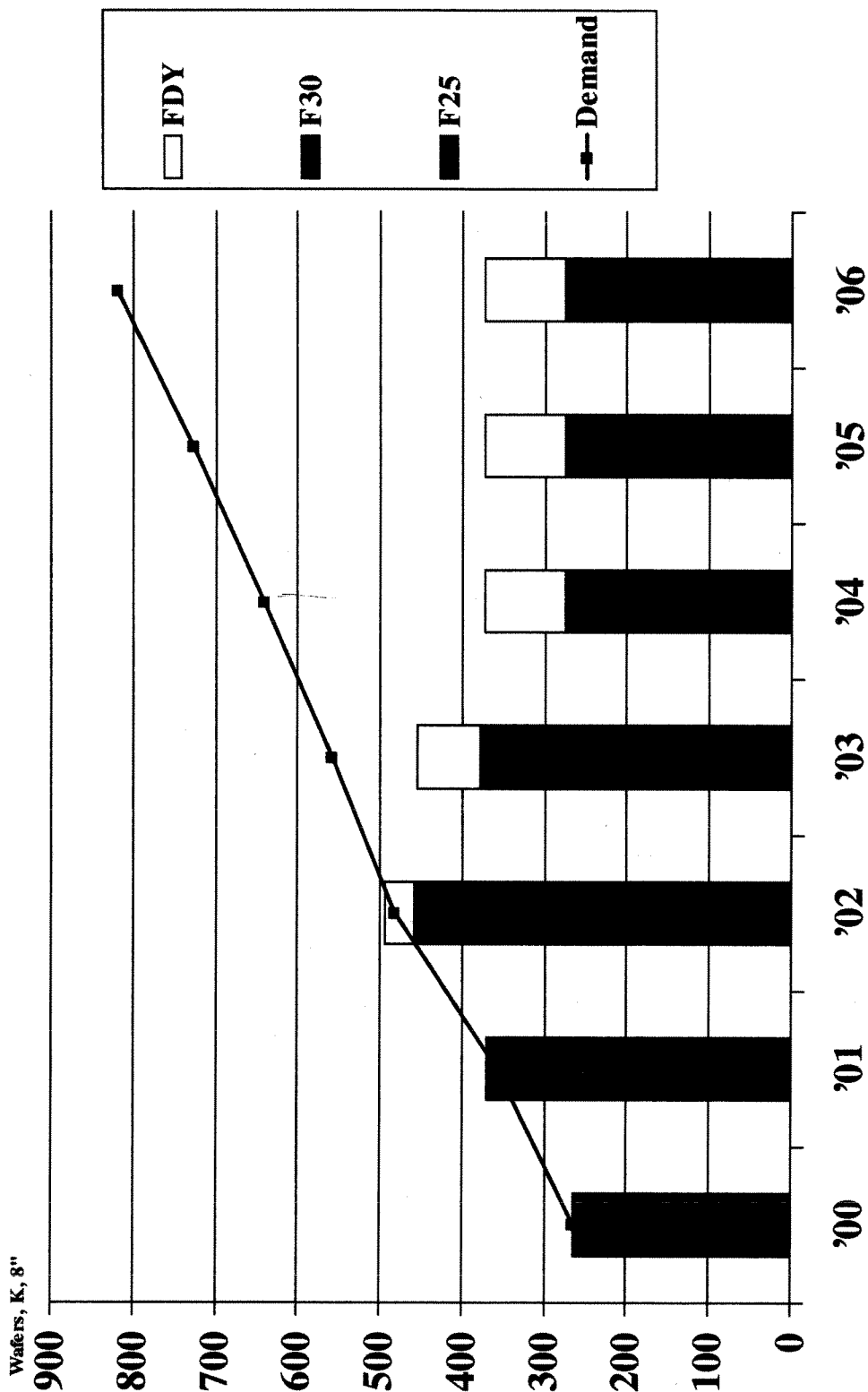
3Q R6Q

Wafers Out (K)	Act		Est		3Q R6Q						Judged					
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01	YR02	YR03	YR04	YR05	YR06	
Capacity																
Fab 25, CS44	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1
Die Demand (M)																
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	52.36	58.90	65.93	72.79	80.07	80.07
										49%	5%	12%	12%	10%	10%	10%
Growth Yr to Yr																
Die Ships Per Wafer																
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130	130
Wafer Demand (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5						
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9						
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223						
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9						
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	402.8	453.1	507.2	559.9	615.9	615.9
Wafer Support (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	208.0	208.0	208.0	208.0	208.0
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	228.0	228.0	228.0	228.0	228.0
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8%	16%	20%	20%	20%	20%
Percentage of Total																
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	538.1	559.7	559.7	559.7	559.7
Delta Support Processors																
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	71.7	85.0	52.5	-0.2	-56.2	-56.2
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	13.0	0.0	0.0	0.0	0.0	0.0	0.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 30 capacity based on plan 5000_2 dated 8/8/00																
Fab 25 converts to copper																
Market share is 23%, 22%, 23%, 23%, for 2001-2005.																

FAB WAFER CAPACITY VS. DEMAND



CASE 037A Maximum (F25 Aluminum, Market Share is 23%, 26%, 27%, 28%, 29% for '01 - '05)



Case 037A Maximum 3Q Req

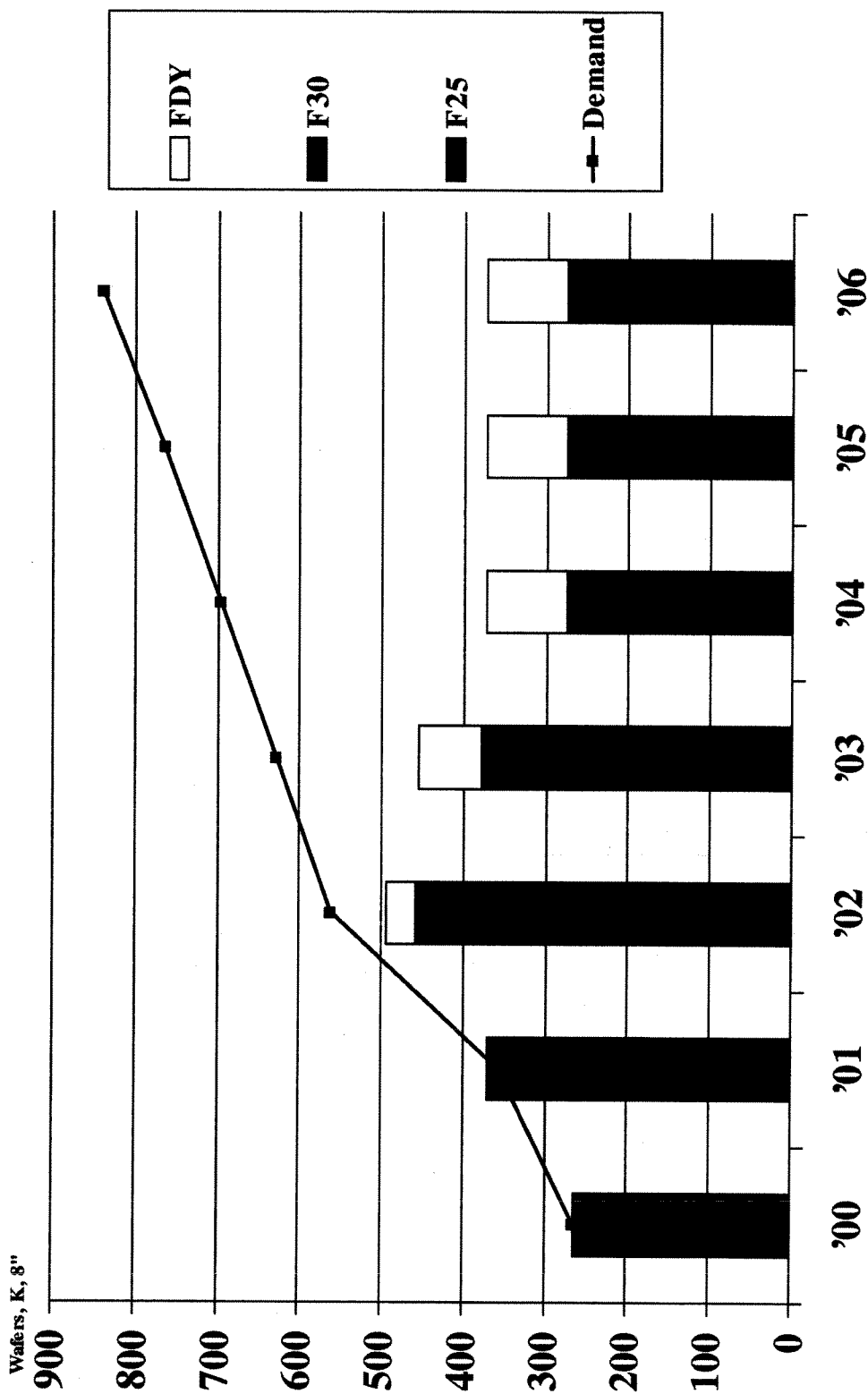
Wafers Out (K)	Act		Est		3Q Req															
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01	YR02	YR03	YR04	YR05	YR06					
Capacity																				
Fab 25, CS44	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0					
Fab 25, CS50	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0					
Total Fab 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0					
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1					
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1					
Die Demand (M)																				
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	60.10	69.95	80.75	91.94	103.89					
Growth Yr to Yr										49%	20%	16%	15%	14%	13%					
Die Ships Per Wafer																				
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130					
Wafer Demand (K)																				
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6										
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0	0.0					
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0					
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223	228.0	124.0	20.0	20.0	20.0					
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1					
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	462.3	538.1	621.2	707.2	799.2					
Wafer Support (K)																				
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6										
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0	0.0					
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0					
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0	20.0					
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1					
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8%	20%	35%	35%	35%					
Percentage of Total																				
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	434.1	351.7	351.7	351.7					
Delta Support Processors																				
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.2	-104.0	-269.5	-355.5	-447.5					
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	104.0	208.0	208.0	208.0					
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0					

Fab 30 capacity based on plan 5000_2 dated 8/8/00
 Fab 25 does not convert to copper
 Market share is 23%, 26%, 27%, 28%, 29%, for 2001-2005.

FAB WAFER CAPACITY VS. DEMAND

CASE 037A Maximum+ (F25 Aluminum, Market Share is 30% for '02 - '06)

AMD

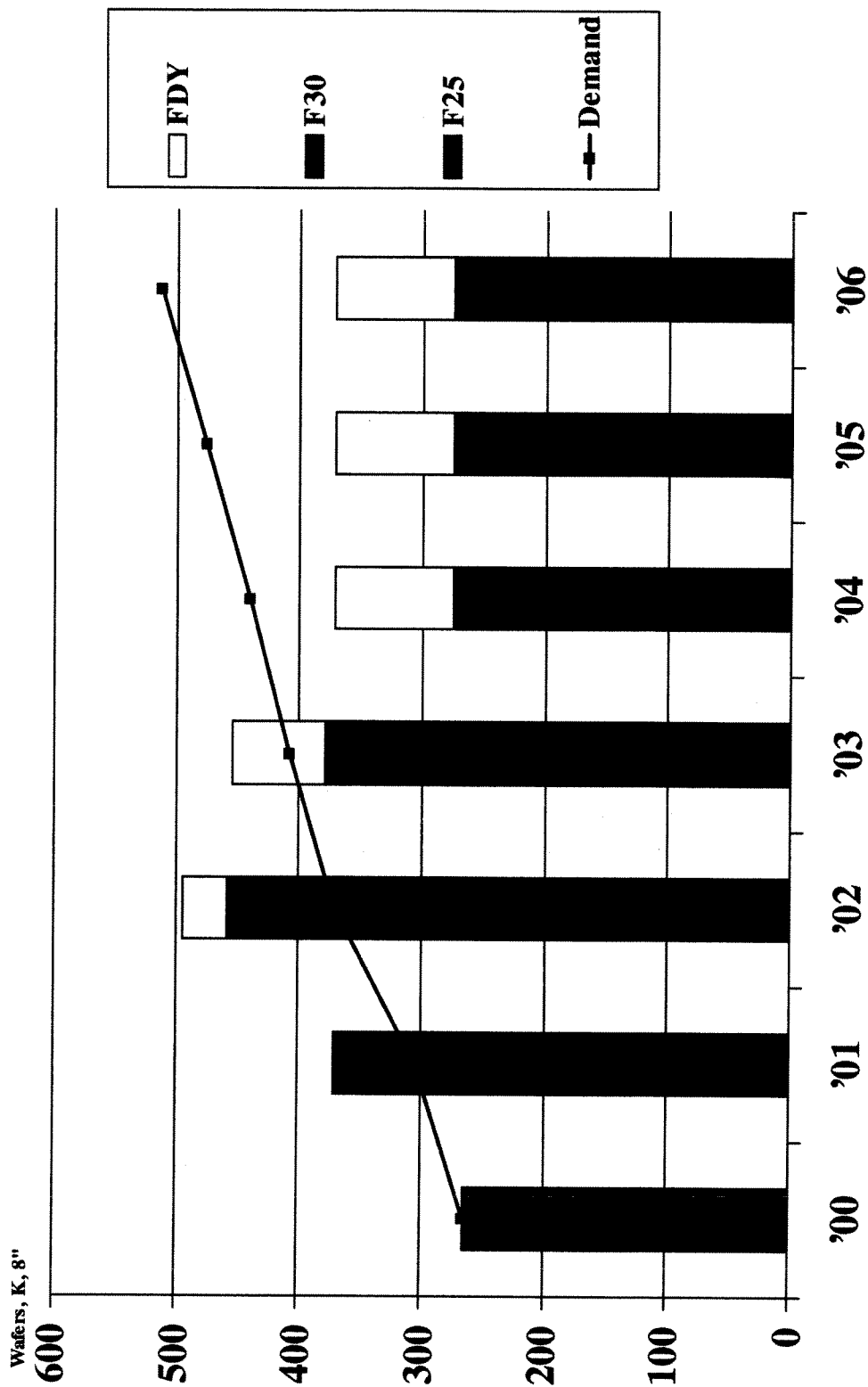


Case 037A Maximum+ 3Q R6Q

Wafers Out (K)	Act 1Q00	Act 2Q00	Est 3Q00	3Q R6Q						YR00	YR01	YR02	YR03	YR04	YR05	YR06
				4Q00	1Q01	2Q01	3Q01	4Q01								
Capacity	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS44	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	228.0
Fab 25, CS50	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25																
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	483.1
Die Demand (M)																
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	70.33	78.98	87.90	96.69	106.36	106.36
										49%	41%	12%	11%	10%	10%	10%
Growth Yr to Yr																
Die Ships Per Wafer	Based on Die divided by wafers															
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130	130
Wafer Demand (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5						
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9						
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223						
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9						
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	541.0	607.5	676.2	743.8	818.2	818.2
Wafer Support (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5	208.0	104.0	0.0	0.0	0.0	0.0
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9	20.0	20.0	20.0	20.0	20.0	20.0
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0	20.0	20.0
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6	96.6
Percentage of Total											8%	20%	35%	35%	35%	35%
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	434.1	351.7	351.7	351.7	351.7
Delta Support Processors																
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-66.5	-173.4	-324.5	-392.1	-466.5	-466.5
											-29.6	-77.1	-144.2	-174.3	-207.3	-207.3
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	104.0	208.0	208.0	208.0	208.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fab 30 capacity based on plan 5000_2 dated 8/8/00																
Fab 25 does not convert to copper																
30% market share 2002-2006																

FAB WAFER CAPACITY VS. DEMAND

CASE 037A Minimum (F25 Aluminum, Market Share is 19% for '01 - '05)



Case 037A Minimum

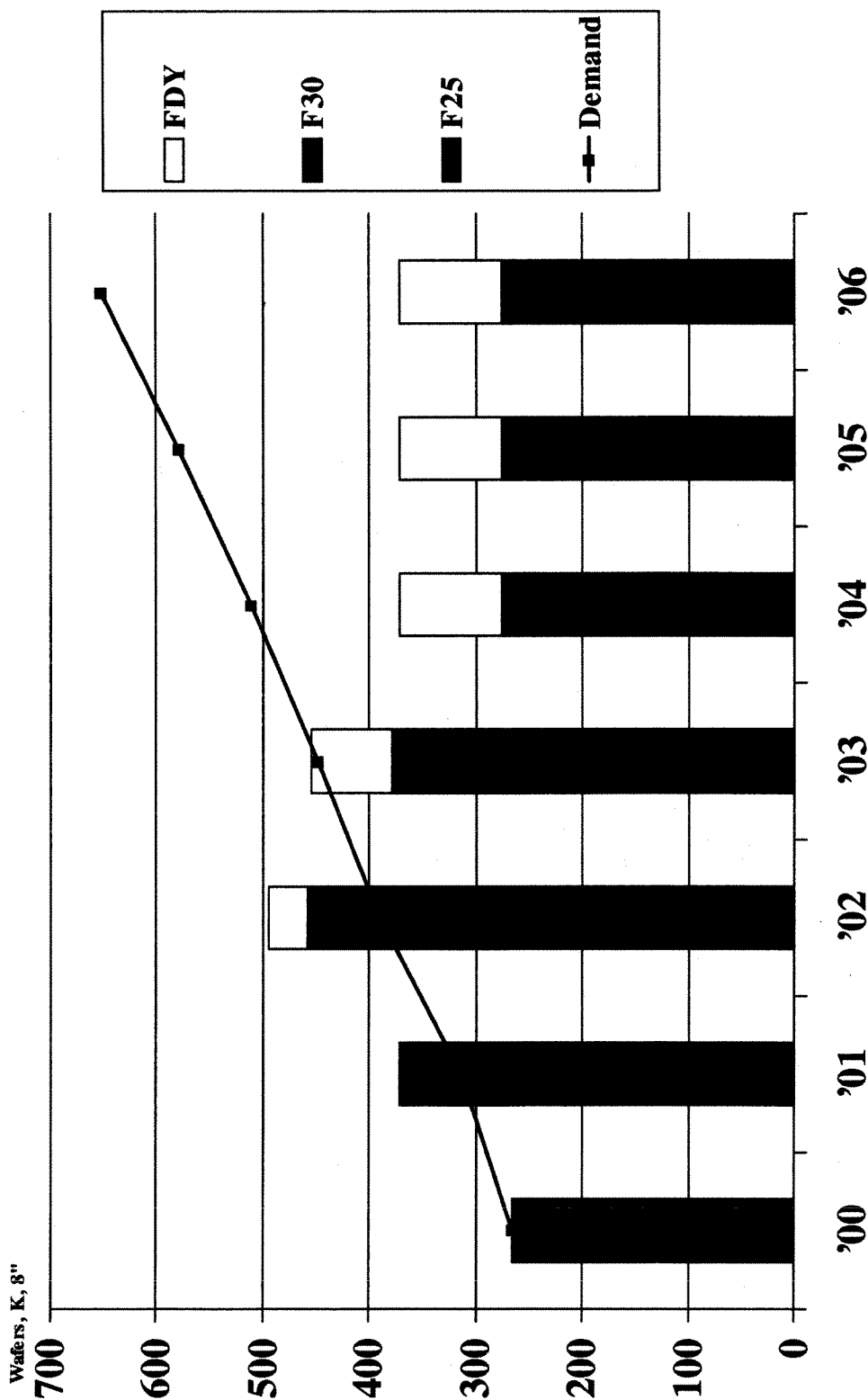
30 R6Q

Wafers Out (K)	Act	Act	Est	4Q00	YR00	YR01	YR02	YR03	YR04	YR05	YR06
Capacity	1Q00	2Q00	3Q00								
Fab 25, CS44	39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0
Fab 25, CS50	18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0
Total Fab 25	57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0
Total Fab 30	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Total uP/Emb Capacity	57.8	53.9	73.8	80.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1
Die Demand (M)											
PC Processors	7.49	6.77	8.69	10.65	33.60	42.34	45.69	50.46	54.70	59.31	64.05
						26%	8%	10%	8%	8%	8%
Growth Yr to Yr											
Die Ships Per Wafer											
PC Processors											
Wafer Demand (K)											
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6					
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5					
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9					
Fab 25	57.8	53.9	64.5	63.0	239.2	171.0					
Fab 30 PC Processors	0.0	0.0	9.2	17.4	26.6	134.9					
Total PC Processor Demand	57.8	53.9	72.2	78.5	262.4	293.0	351.5	388.2	420.8	456.2	492.7
Wafer Support (K)											
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	85.6	6.6					
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	150.2	151.5	121.0	104.0	0.0	0.0	0.0
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	3.4	12.9	20.0	20.0	20.0	20.0	20.0
Fab 25	57.8	53.9	64.5	63.0	239.2	171.0	141.0	124.0	20.0	20.0	20.0
Fab 30 Processor	0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	36.0	75.0	96.6	96.6	96.6
Percentage of Total							0%	20%	35%	35%	35%
Total Processor Support	57.8	53.9	72.2	78.5	262.4	293.0	387.5	434.1	351.7	351.7	351.7
Delta Support Processors											
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	36.0	45.9	-69.1	-104.5	-141.0
							16.0	20.4	-30.7	-46.5	-82.7
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	0.1	65.0	87.0	104.0	208.0	208.0	208.0
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fab 30 capacity based on plan 5000_2 dated 8/8/00
 Fab 25 does not convert to copper
 Market share is 19% for 2001-2005.

FAB WAFER CAPACITY VS. DEMAND

CASE 037A Best Guess (F25 Aluminum, Market Share is 20%, 21%, 21%, 22%, 23% for '01 - '05)



Case 037A Best Guess

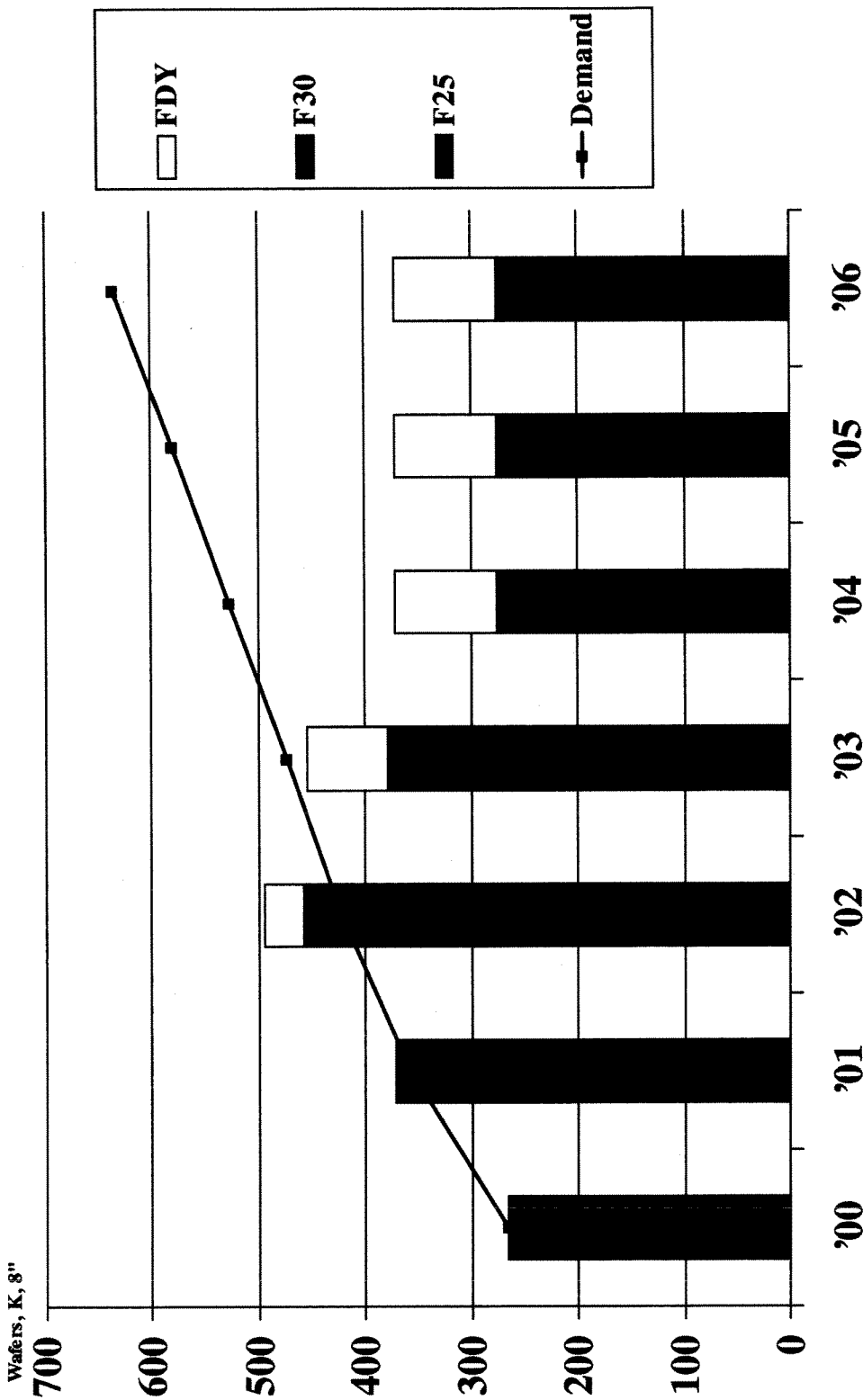
3Q R6Q

Wafers Out (K)		Act	Act	Est										
		1Q00	2Q00	3Q00	4Q00	YR00	YR01	YR02	YR03	YR04	YR05	YR06		
Capacity														
Fab 25, CS44		39.3	21.0	16.4	11.9	88.6	8.0	0.0	0.0	0.0	0.0	0.0		
Fab 25, CS50		18.5	32.9	48.2	51.1	150.7	228.0	228.0	228.0	228.0	228.0	228.0		
Total Fab 25		57.8	53.9	64.6	63.0	239.3	236.0	228.0	228.0	228.0	228.0	228.0		
Total Fab 30		0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1		
Total uP/Emb Capacity		57.8	53.9	73.8	80.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1		
Die Demand (M)														
PC Processors		7.49	6.77	8.69	10.65	33.60	43.34	48.16	55.66	63.84	72.67	82.12		
Growth Year to Year							29%	11%	16%	15%	14%	13%		
Die Ships Per Wafer		Based on Die divided by wafers												
PC Processors		130	126	120	136	128	144	130	130	130	130	130		
Wafer Demand (K)														
Fab 25 CS44 PC		39.3	21.0	15.2	10.1	85.6	6.6							
Fab 25 CS50 PC		18.5	32.9	47.8	51.0	150.2	158.5							
Fab 25 EPD Embedded		0.0	0.0	1.5	1.9	3.4	12.9							
Fab 25		57.8	53.9	64.5	63.0	239.2	178.0							
Fab 30 PC Processors		0.0	0.0	9.2	17.4	26.6	134.9							
Total PC Processor Demand		57.8	53.9	72.2	78.5	262.4	300.0	370.5	428.2	491.1	559.0	631.7		
Wafer Support (K)														
Fab 25 CS44 PC		39.3	21.0	15.2	10.1	85.6	6.6							
Fab 25 CS50 PC		18.5	32.9	47.8	51.0	150.2	158.5							
Fab 25 EPD Embedded		0.0	0.0	1.5	1.9	3.4	12.9							
Fab 25		57.8	53.9	64.5	63.0	239.2	178.0							
Fab 30 Processor		0.0	0.0	9.2	17.4	26.6	134.9	230.5	255.1	255.1	255.1	255.1		
Foundry Processor Support		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Percentage of Total														
Total Processor Support		57.8	53.9	72.2	78.5	262.4	300.0	425.0	434.1	351.7	351.7	351.7		
Delta Support Processors														
8" Equivalent		0.0	0.0	0.0	0.0	0.0	0.0	54.5	5.9	-139.4	-207.3	-280.0		
Delta Capacity Fab 25		0.0	0.0	0.1	0.0	0.1	58.0	49.5	104.0	208.0	208.0	208.0		
Delta Capacity Fab 30		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Fab 30 capacity based on plan 5000_2 dated 8/8/00
 Fab 25 does not convert to copper
 Market share is 20%, 21%, 21%, 22%, 23% for 2001-2005.

FAB WAFER CAPACITY VS. DEMAND

CASE 037A Nominal (F25 Aluminum, Market Share is 23%, 22%, 22%, 23% for '01 - '05)



Case 037A Nominal

3Q R6Q

Wafers Out (K)	Act		Est		3Q R6Q											
	1Q00	2Q00	3Q00	4Q00	1Q01	2Q01	3Q01	4Q01	YR00	YR01	YR02	YR03	YR04	YR05	YR06	
Capacity																
Fab 25, CS44	39.3	21.0	16.4	11.9	3.0	3.0	0.5	1.5	88.6	8.0	0.0	0.0	0.0	0.0	0.0	
Fab 25, CS50	18.5	32.9	48.2	51.1	57.0	57.0	57.0	57.0	150.7	228.0	228.0	228.0	228.0	228.0	228.0	
Total Fab 25	57.8	53.9	64.6	63.0	60.0	60.0	57.5	58.5	239.3	236.0	228.0	228.0	228.0	228.0	228.0	
Total Fab 30	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	
Total up/Emb Capacity	57.8	53.9	73.8	80.4	89.0	89.3	95.2	97.4	265.9	370.9	458.5	483.1	483.1	483.1	483.1	
Die Demand (M)																
PC Processors	7.49	6.77	8.69	10.65	11.31	11.74	13.38	13.57	33.60	50.00	52.36	56.90	65.93	72.79	80.07	
										49%	5%	12%	12%	10%	10%	
Growth Yr to Yr																
Die Ships Per Water																
PC Processors	130	126	120	136	142	145	145	148	128	145	130	130	130	130	130	
	Based on Die divided by wafers															
Water Demand (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5						
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9						
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223						
Fab 30 PC Processors	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9						
Total PC Processor Demand	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	402.8	453.1	507.2	559.9	615.9	
Water Support (K)																
Fab 25 CS44 PC	39.3	21.0	15.2	10.1	5.5	1.1	0.0	0.0	85.6	6.6						
Fab 25 CS50 PC	18.5	32.9	47.8	51.0	45.4	50.7	54.3	53.1	150.2	203.5						
Fab 25 EPD Embedded	0.0	0.0	1.5	1.9	2.0	2.3	3.2	5.4	3.4	12.9						
Fab 25	57.8	53.9	64.5	63.0	52.9	54.1	57.5	58.5	239.2	223.0	228.0	124.0	20.0	20.0	20.0	
Fab 30 Processor	0.0	0.0	9.2	17.4	29.0	29.3	37.7	38.9	26.6	134.9	230.5	255.1	255.1	255.1	255.1	
Foundry Processor Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8%	75.0	96.6	96.6	96.6	
Percentage of Total												20%	35%	35%	35%	
Total Processor Support	57.8	53.9	72.2	78.5	79.9	81.1	92.0	92.0	262.4	345.0	474.5	434.1	351.7	351.7	351.7	
Delta Support Processors																
8" Equivalent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	71.7	-19.0	-155.5	-208.2	-264.2	
											31.9	-8.4	-69.1	-92.5	-117.4	
Delta Capacity Fab 25	0.0	0.0	0.1	0.0	7.1	5.9	0.0	0.0	0.1	13.0	0.0	104.0	208.0	208.0	208.0	
Delta Capacity Fab 30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Fab 30 capacity based on plan 5000_2 dated 8/8/00																
Fab 25 does not convert to copper																
Market share is 23%, 22%, 22%, 23%, 23%, for 2001-2005.																